

6. Open (Search/Edit) or New (Add/Insert)

Note: Selecting Open allows you to display and edit a record that was previously stored, whereas selecting New allows you to create a new record.

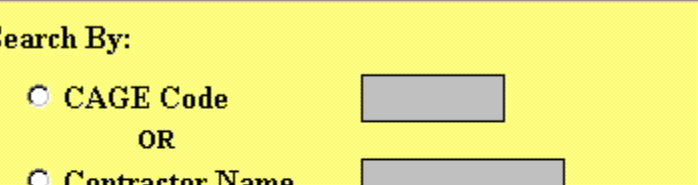
Whenever you open a Metrics function, the first thing you must do is select either Open or New. For information on selecting these options, see Section 5.3 Menu Bar and Section 5.4 Tool Bar. The remainder of this section contains a general explanation of the Open and New options. For procedural information specific to a particular Metrics function, see the section in this guide devoted to that function. For example, to find out about how to Open an existing Formal PreAward Surveys record, see Section 10.

6.1 Open (Search/Edit)



If you want to display an existing record to view or edit, click the Open icon or select Open from the drop-down list of File options. When you do this, a Search window, the same as or similar to the sample shown in Figure 6.1 pops up on your monitor. (*Note: All Search windows are different.*) Use this window as follows:

- 1) Select the type of information for the search by clicking on the circle in front of what you want to search by. When selected, the circle is filled in.
- 2) Enter the information.
- 3) Click on **OK**.



Formal Preaward Search [X]

Search By:

☒ CAGE Code

OR

☐ Contractor Name

☐ Date of Request

From:

To:

Figure 6.1 Sample Search Window

Most of the time, the information requested for a search will be codes, numbers and names. Sometimes, however, you will have the option of entering a date (range) such as for the Date of Request (Figure 6.1). If you decide to search for a contractor's name, select Contractor

Name by clicking on it, and then type in the name. You must type in at least the first three (3) letters of the name and may type in up to 28. The more letter you correctly enter, the shorter the list of names that will meet your search criteria. This means fewer names for you to search from.

If you decide to search by Date of Request, select Date of Request by clicking its circle, and then type in a date range. For example, if you know that the request was made during the week that included May 22, 1996, type 052096 in the From box, and then press the Tab or Enter key. The system displays your date as 20-MAY-1996. Next type 052496 in the To box, and press the Tab or Enter key. The system displays this date as 24-MAY-1996. If you know that it was requested on May 22, 1996, type in 052296 in both the From and To boxes. ***Note: You must press Tab or Enter as a signal to your computer that the information was entered; otherwise, the search will not work.***

After you enter the information you want to find, click **OK**. When you click **OK**, one of the following things can happen.

- No records will be found that match the information you entered. If this happens, you will see a message window (Figure 6.2) pop up on your monitor. Click on **OK** to close the Message window. You can then choose to search for a record again (Open), add a record (New), go to another Metrics function or exit the Metrics application.



Figure 6.2 No Data Found Pop-Up Message

- One or more records will be found that match the information you entered. If this happens, a pop-up window like the one shown in Figure 6.3 will open displaying all of the matching records. Click on the record you want. (Depending on how many matching records were found, you may have to use scrolling arrows to view them all.) Information about the record you select will then be displayed on your monitor where you can then view or edit (with some restrictions) the displayed information. *Notes: For some Metrics functions, the information you enter into a Search window will always identify a single record. There will be no Search Results window for these functions. Instead, the system will automatically display that single record on your monitor.*

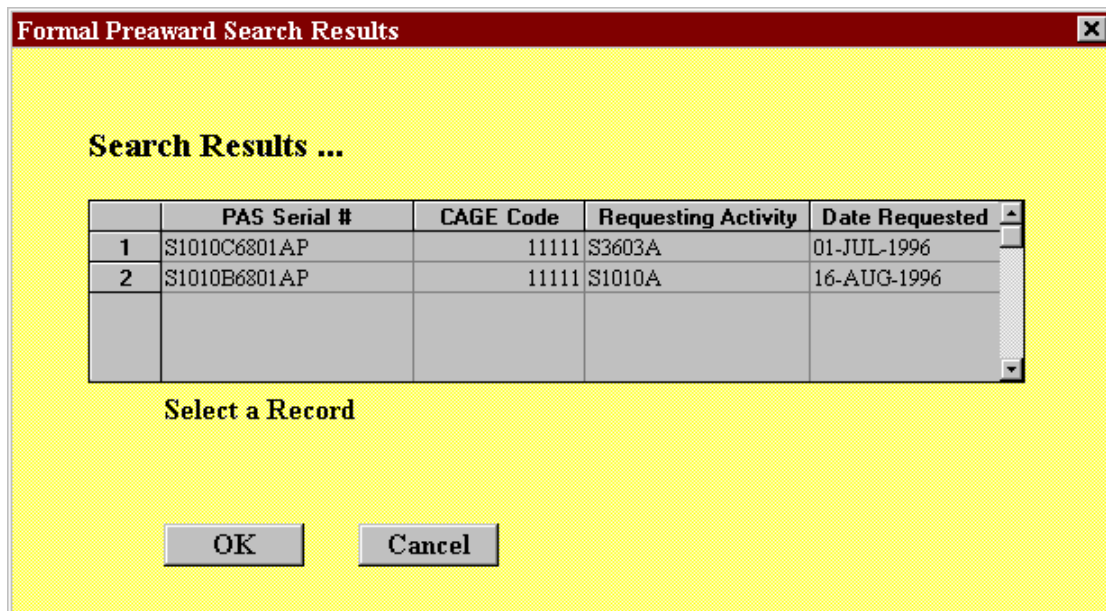


Figure 6.3 Search Results Pop-Up Window

You can close the Search pop-up window or the Search Results window at any time by clicking on the **Cancel** button. This will return the original screen from which you may choose another option or exit the Metrics application.

6.2 New (Add/Insert)



To add (insert) a new record, select either the New icon or New from the drop-down list of File options. The cursor then appears in one of the data boxes on the screen for you to begin entering the requested information.